SCHEDULE NO. 7

GENERAL ADMINISTRATIVE RECORDS

General Description: General administrative records include those for which the "record" copy is kept by the municipal clerk or another office and for which duplicate copies are widely distributed throughout the organization for reference or informational purposes. This schedule also addresses records that are typically kept by any number of departments in an organization, such as project records.

The retention periods specified in this schedule apply to the information contained within the record, regardless of the physical format of the record (paper, microfilm, computer disk or tape, optical disk, etc.). **Duplicate Copies**: Provided that no retention period is specified for duplicate copies, retain those that are created for **administrative purposes** for 1 year, and retain those created for **convenience or reference purposes** until no longer needed or for 1 year, whichever is first. Duplicate copies should not be retained longer than the record copy.

7.05 ADMINISTRATIVE PROCEEDINGS RECORDS <*Added 4/06*>

Records of formal administrative proceedings conducted by municipal staff (possibly subject to appeal to the governing body or the courts) in accordance with law to make administrative rulings or determinations regarding a variety of matters (examples: sales tax exemptions, nuisance abatements, minor personnel matters not otherwise covered by the retention manual). See also *3.110.G, Protest Records – Petitions.*

Retention: 2 years + current, provided all rights of appeal have expired

7.10 AFFIDAVITS OF PUBLICATION

Proof of publication provided by newspapers regarding publication of ordinances, public hearing notices, bid solicitations, bond redemption notices, payment of bills, etc. Affidavits of publication are also sometimes known as "legals" or "proofs."

Retention: 6 years + current, unless it provides the only existing copy of a permanent document

7.20 AGREEMENTS AND CONTRACTS

Agreements and contracts of various kinds that document some form of agreement that is enforceable by law between the municipality and other parties, including but not limited to intergovernmental agreements, memoranda of understanding, franchise agreements, lease agreements, professional services agreements, etc. Note: See other Schedules for various types of agreements and contracts.

Retention: 6 years + current after expiration or fulfillment of all terms of the agreement or contract, whichever is later, provided that audit has been completed and that the agreement or contract no longer has any binding effect; *except* prior to destruction, evaluate for continuing legal, administrative or historical value

7.30 ASSOCIATIONS AND ORGANIZATIONS

See *7.120, External Groups and Agencies* and *7.200, Memberships.*

7.40 AWARDS AND HONORS

Awards and honors received by the municipality, departments or municipal programs from various public or private sources.

Retention: Permanent

7.50 CHARTER RECORDS

A. *Charter Proceedings*

Records relating to the adoption, amendment or repeal of Home Rule Charters or provisions of the Charter. See also *3.110.C, Charter Initiative Petitions.*

Retention: Permanent

B. *Charters – Published*

Governing documents for Home Rule Municipalities that are typically published separately or as part of the municipal code book.

Retention: Permanent

Duplicate Copies: Until superseded

7.60 CODE BOOK RECORDS

A. *Codes Adopted by Reference*

Includes model traffic code, uniform and international building and construction codes, fire codes and supplements to such codes, and other similar codes adopted by ordinance for the municipality.

Retention: Retain 1 copy permanently for historical purposes

Duplicate Copies: Until superseded

B. *Codifications/Supplements*

All versions of codifications of municipal ordinances typically called the Municipal Code and all supplements containing amendments to the initially adopted Code.

Retention: Permanent

Duplicate Copies: Until superseded

7.70 COMMITTEES – INTERNAL

Records of committees, task forces or other types of groups composed of members of the staff and/or other municipal entities that meet on an ongoing basis or that are set up for specific purposes. Examples include staff meetings, employee safety committees, teams established to work on municipal issues, etc.

A. *Ongoing Committees*

Retention: 2 years + current, provided records have no enduring value

B. *Special Committees*

Retention: Until work of committee concludes, provided records have no enduring value

7.80 COMPLAINTS, ROUTINE SERVICE REQUESTS AND NONBINDING PETITIONS

Communications of various types that convey objections, dissatisfaction or disagreement with actions or positions taken or not taken by the municipality; routine requests for service or information; and petitions with no legal effect that are submitted to the municipality to express the opinions of the signers. See also *8.110, Minutes and Supporting Documentation.*

Retention: 1 year + current after response or action by the municipality

7.90 CORRESPONDENCE AND GENERAL DOCUMENTATION

Correspondence is a written communication that is sent to or received by 1 or more individuals via the U.S. mail, private courier, facsimile transmission or electronic mail (see *Schedule 7 Electronic Mail*), including letters, postcards, memoranda, notes, telecommunications and any other form of addressed, written communications that are sent or received by the municipality. The term *general documentation* is intended to cover a wide variety of records created in the normal course of business.

A. *Calendars and Notes*

Records kept to document and facilitate the routine planning and scheduling of meetings, appointments and similar activities; includes calendars, appointment books, telephone messages, notes, diaries and similar records with routine content.

Retention: 1 year

B. *Enduring Long-Term Value*

Documentation or correspondence with enduring and long-term administrative, policy, legal, fiscal, historical or research value; records that relate to policy issues and actions or activities in which an important precedent is set; records of historic events relating to the municipality or the community; and other similar records and documentation.

Retention: Permanent

C. *Routine Value*

Operating documentation that is routine and contains no significant administrative, legal, fiscal, historical, informational or statistical value. Includes routine letters or memoranda sent and received, reading or chronological files that are kept solely for convenience and contain duplicates of memos or letters that are also filed elsewhere, routine requests for information, transmittal documents, etc., and includes e-mail. <Amended 1/03>

Retention: 1 year + current

D. *Transitory Value*

General documentation of extremely short-term value, including advertisements, drafts and worksheets, desk notes, copies of materials circulated for informational "read only" purposes, other records with preliminary or short-term informational value, and includes e-mail. <Amended 1/03>

Retention: Until material has been read

7.100 ELECTRONIC RECORDS

A. *Computer-Maintained Records*

Records manipulated and stored using computer technologies.

Retention: Follow the retention schedule for the specific type of record

B. *Electronic Mail*

Electronic mail is an electronic message that is transmitted between 2 or more computers or electronic terminals, whether or not the message is converted to hard copy format after receipt and whether or not the message is viewed upon transmission or stored for later retrieval, including electronic messages that are transmitted through a local, regional or global computer network [CRS 24-72-204.5].

Retention: Follow the retention schedule for the specific type of record

7.110 EVENT RECORDS

Records such pertaining to promotion and organization of special and historic community events or celebrations in which the municipality has a role, such as festivals, fairs, rodeos, 4th of July celebrations, pioneer days, Christmas lighting, etc.

Retention: 2 years after event concludes, *except* retain records documenting significant aspects of the event permanently

7.120 EXTERNAL GROUPS AND AGENCIES

Records such as meeting agendas and minutes, studies and reports and other material provided to the municipality for courtesy or informational purposes from associations, organizations, groups and agencies that are not part of the municipal organization but which have some form of association or relationship with the municipality. See also *7.200, Memberships* and *7.365, Special District Records*. <Amended 2/08>

Retention: Until no longer needed for municipal reference or informational purposes

7.130 FORMS – BLANK

Blank forms are not considered to be records and should be separated from the municipality's records. However, a master forms file may be maintained to track the evolution of the form and instructions regarding use of the form.

Retention: Until superseded, *except* retain 1 copy permanently if a master forms file is maintained

Duplicate Copies: Until superseded

7.140 GENERAL SUBJECT FILES

Files containing correspondence, reports, technical papers, studies, reference materials and other records related or received in the general administration of a program or in the daily management of departments or offices.

A. General Administrative Records

Records of a general administrative nature that are created or received in the course of administering programs, including daily, weekly or monthly activity reports which are summarized in an annual report. See also *7.270, Program Records* and *7.330, Reports*.

Retention: 1 year + current or until no longer needed for reference

B. Housekeeping Files

Records of a general housekeeping nature that are maintained by an office and that do not relate directly to the primary program responsibility of the office. Includes records such as charity fund drives, office parties, custodial service requests, parking space assignments, telephone and fax logs, and distribution of keys.

Retention: Until no longer needed for reference

C. Policy and Program Development Records

Records documenting the formulation and adoption of policies and procedures and the functions of the municipality or its departments. Includes narrative or statistical reports, related correspondence on program activities, organizational charts and mission statement studies regarding municipal or department operations, and records related to significant events in which the municipality, departments or individual offices participated. See also *7.270, Program Records*.

Retention: Permanent

D. Technical or General Reference Files <Amended 2/05>

Non-record copies of articles, periodicals, reports, studies, vendor catalogs and similar materials that are needed for reference and information but are not considered to be part of the office's records. See also *7.120, External Groups and Agencies*.

Retention: Until no longer needed for reference

7.150 LEGISLATION AND REGULATORY ACTIONS

A. External

Records such as review copies of proposed or adopted state or federal bills, legislation or regulations; notices of proposed rulemaking by federal or state agencies.

Retention: Until no longer needed for reference

B. Internal

See *8.70, Governing Body as Another Decision-Making Body.*

7.160 MAILING AND DISTRIBUTION RECORDS

Documentation of transactions with the U.S. Postal Service or private carriers.

A. Certified Mail Return Receipts

Receipts returned by the post office to document that the recipient received a mailing sent by the municipality.

Retention: 2 years after matter referenced in mailing is concluded

B. Envelopes

Envelopes that contained communications received by the municipality.

Retention: Dispose of immediately, unless needed in rare circumstances as documentation of mailing and receipt dates

C. Mailing and Distribution Lists

Lists of names and addresses compiled for various mailings, such as billings, notifications, community outreach and other administrative purposes.

Retention: Until superseded or obsolete

D. Meeting Notification Lists

Listings kept of persons who, within the previous 2 years, have requested advance notification of all meetings or meetings with specific content [CRS 24-6-402(7)].

Retention: Until updated

E. Record of Mailing

Documentation of mailing dates, content of mailings and addressees for mailing sent by the municipality for various purposes.

Retention: 2 years

F. Undeliverable Mailings

Mailings (excluding mailed ballots) sent by the municipality that were returned as undeliverable.

Retention: 2 years after matter referenced in mailing is concluded

7.170 MANUALS AND HANDBOOKS

See *6.120, Manuals –Vehicles and Equipment* and *7.260, Policies and Procedures Documentation.*

7.180 MAPS AND DRAWINGS

Wide range of maps, drawings, architectural, cartographic and engineering records, including maps, charts, photomaps, field survey notes, map history case files and map and drawing finding aids; graphic representations at reduced scale of selected physical and cultural features of the surface of the earth; architectural and engineering drawings depicting concepts and precise measurements needed to plan and build static structures, such as buildings, bridges and streets; design and construction drawings for major municipal projects; maps and drawings stored and generated by Geographic Information System (GIS) and computer-aided design (CAD) systems; "as built" drawings of municipal facilities; annexation and development plats and plans; various construction drawings and renderings; municipal boundary maps, election precinct and ward or district maps, zoning district maps; USGS topographical maps of the area; and other similar documents.

Retention: Permanent

Duplicate Copies: Until superseded or no longer needed for reference

A. GIS Records <Added 12/04>

Geospatial data that is used to describe a particular location, area or feature. Records include software, input (including electronic source data and data from source documents), data in electronic format, output to paper, disk, tape or other storage medium generated by the system, and documentation needed to facilitate human understanding of the system.

1. Back-ups and Historical Snapshots – GIS <Added 12/04>

Back-up records retained for disaster recovery purposes and historical snapshots (electronic format) retained for historical and reference purposes containing all GIS data layers and associated attribute files, GIS user production areas, the operating system and other miscellaneous software.

a. Back-ups for Disaster Recovery Purposes <Added 12/04>

1) Daily Back-up <Added 12/04>

Retention: 2 weeks

2) Monthly Back-up <Added 12/04>

Retention: 1 year

3) Replicate Copies <Added 12/04>

Copies retained on other work unit servers, in offsite data warehouse, on “read-only” municipal system, or elsewhere, either onsite or offsite.

Retention: Until superseded by new version of back-up

b. Historical Snapshots <Added 12/04>

Retention: Permanent

2. *Data Documentation and Metadata* <Added 12/04>

Records created during development or modification of an automated system, which are necessary to access, retrieve, manipulate and interpret data in that system and records that explain the meaning, purpose, structure, logical relationships and origin of the data elements. Data documentation includes data dictionaries (containing information about data layers, format and other documentation), file layouts, code books or tables, definition files and information regarding the retention period for the data and associated data documentation as well as information regarding the frequency of historical snapshots of the data and data documentation. Data documentation includes metadata (data about the data), i.e. the description of the data resources, its characteristics, location, usage, etc. Metadata is used to identify, describe and define user data.

a. *Condensed (Temporary) Metadata* <Added 12/04>

Temporary generic information that provides a dataset list (Word document) and basic information about datasets, pending the storage of “real” metadata with datasets on the GIS; includes dataset name, definitions and descriptions, data locations, significant items in attribute (tabular) data, etc.

Retention: Until superseded by metadata stored on GIS

b. *Data Documentation and Metadata – Nonpermanent GIS Records* <Added 12/04>

See also *Datasets and Data Files – Temporary*. Note: Obsolete temporary datasets are to be purged from the system prior to each annual GIS snapshot.

Retention: 1 year after superseded, or until deletion of database

c. *Data Documentation and Metadata – Permanent GIS Records* <Added 12/04>

This retention schedule applies only to documentation relating to databases containing permanent information. Important Note: Permanent data and its associated metadata and data documentation is retained permanently only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot. See also *Datasets and Data Files*.

Retention: Until superseded

3. *Datasets and Data Files – Permanent* <Added 12/04>

A *dataset* is group of related records that are organized and treated as a unit or any set of data that has a common theme or similar attributes. The term is used interchangeably with the term *data file*. Datasets are part of the GIS database. A data layer refers to a conceptual grouping of data that share common characteristics, such as a layer composed of base or thematic data, e.g. roads (base) or wildlife habitat (thematic). Geographic data combines and links graphic representations of features or events found on the earth with corresponding tabular (attribute) data. Important Note: Permanent data is retained permanently only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot.

a. *Aerial Photograph and Image Datasets* <Added 12/04>

Photographs and digital images of the earth that have been taken from airborne vehicles to evaluate, measure or map selected features of the landscape.

Retention: Until superseded

b. ***Base Datasets*** <Added 12/04>
Core data working files that are sets of information providing a background orientation for another layer of primary focus. Examples: ground and water features (roads, streams, lakes, canals, railroads, etc.) and parcels, addresses, quarter sections, etc.

Retention: Until superseded

c. ***Building and Structure Datasets*** <Added 12/04>
Building footprints, public buildings, building inspection zones, building permits, etc.

Retention: Until superseded

d. ***Business Information Datasets*** <Added 12/04>
Business locations, licensed establishments, etc.

Retention: Until superseded

e. ***Census Datasets*** <Added 12/04>
Census block groups, census tract boundaries, census update boundaries, etc.

Retention: Until superseded

f. ***Communication System Datasets*** <Added 12/04>
Fiber optic network installations.

Retention: Until superseded

g. ***Emergency Dispatch Datasets*** <Added 12/04>
Emergency telephone dataset used for emergency services dispatch.

Retention: Until superseded

h. ***Engineering Datasets*** <Added 12/04>
Street standards and facilities, etc.

Retention: Until superseded

i. ***Environmental Datasets*** <Added 12/04>
Geologic data, soils data, radon data, etc.

Retention: Until superseded

j. ***Facilities Datasets*** <Added 12/04>
Community facilities locations, municipal buildings and facilities, natural areas, parks, protective services facilities, public art locations, school locations, trails, pedestrian and bicycle trails, etc.

Retention: Until superseded

k. Jurisdictional Boundary Datasets <Added 12/04>

Municipal limits, election boundary maps, boundary maps of political subdivisions and taxing districts, enterprise zones, historic districts, protective services patrol and enforcement areas, school district boundaries, urban growth area maps, zip code boundaries, other municipalities, etc.

1) Boundaries – Municipal Jurisdictional Units <Added 12/04>

Retention: Until superseded

2) Boundaries – Other Jurisdictions <Added 12/04>

Retention: Until superseded

l. Land Use and Planning Datasets <Added 12/04>

Annexations, pending and approved developments, neighborhood planning areas, habitat data, current and proposed land uses, corridor study data, airport impact data, comprehensive plan (Structure Plan) data, transit routes, travel corridors, vacant land inventories, current and proposed zoning, zoning violations, etc.

Retention: Until superseded

m. Stormwater and Flooding Datasets <Added 12/04>

Base flood elevations, storm drainage basins, floodplains and floodways, historic flooding data, facility inventories, monitoring system data, etc.

Retention: Until superseded

n. Transportation System Datasets <Added 12/04>

Alley and street system data, bicycle and bus routing data, master street plan, street maintenance data, traffic flow data, etc.

Retention: Until superseded

4. Datasets and Data Files – Temporary <Added 12/04>

a. Assessor Datasets <Added 12/04>

GIS data layers containing property or land ownership information obtained from the County Assessor.

Retention: Until superseded

b. Symbol Datasets <Added 12/04>

Municipal logo, highway marker symbols, parking lot symbols and similar mapping symbols used for printing purposes.

Retention: Until superseded

c. Temporary Data – In General <Added 12/04>

Datasets or data subsets created for one-time or short-term use or for the creation of various versions of mapping products.

Retention: 30 days after use, unless the customer requests that the temporary dataset be retained for possible future use. Note: Temporary datasets will appear on periodic computer back-up tapes, and those that are obsolete should be purged from the system before capturing the annual historical snapshot of GIS.

5. ***Fee Collections*** <Added 12/04>
Records of orders and receipts for payment from external customers for mapping products.

Retention: 2 years + current

6. ***Finding Aids*** <Added 12/04>
See *7.180.A.2, Data Documentation and Metadata.*

7. ***Policy Documentation - GIS*** <Added 12/04>
Records of GIS policies including those covering access and security, systems development, data retention and disposition, data distribution, rules governing issuance of data, and data ownership, etc.

Retention: Permanent

8. ***Processing Files*** <Added 12/04>
System logs and other processing files (electronic or printed on demand), including work files, test files, input/source files, intermediate input/output files, valid transaction files, documentation of users and operations, and audit trail files.

Retention: Follow system schedule

9. ***Source Documents – GIS*** <Added 12/04>
Raw data or documents or "source records" containing images and/or data provided to GIS in hard copy, microform or electronic format. Note: Metadata should include information regarding the source of the data.

   a. ***Externally Acquired Source Material*** <Added 12/04>
   GIS input and auto cad system input regarding plats and subdivisions, field book information, legal descriptions, images of plats, data and other source material acquired from other agencies and organizations.

   Retention: Until uploaded to GIS, provided source of data is noted in data documentation

   b. ***Internally Acquired Source Material*** <Added 12/04>

      1) ***Replicate Source Data – Municipal Departments*** <Added 12/04>

      Retention: Until uploaded to GIS

      2) ***Surveying Source Data*** <Added 12/04>
      Municipal surveyor's reports and field notes from property surveys used to identify monuments, landmarks, buildings, etc. Engineering control and survey point data. Legal descriptions developed from surveys and surveying data returned from field instruments including horizontal angles, slope distance, horizontal distance, zenith angles, sun observations, drawings, etc.

      Retention: Until data is transferred to GIS

10. *Standards* <Added 12/04>
Requirements that are intended to make hardware, software and data compatible and that cover data capture, accuracy, sources, base categories, output, and data element dictionaries.

Retention: Life of GIS

11. *Website Records* <Added 12/04>
Annual snapshot of GIS web page (electronic format).

Retention: Permanent

7.190 MAPS – INFORMATIONAL

Maps that are acquired from external sources and are used for municipal reference and informational purposes for the municipality or the public, such as county maps.

Retention: Until superseded or no longer needed for reference

7.200 MEMBERSHIPS

Records of memberships that are paid for by the municipality of municipal officials, employees or the municipality as an organization in professional associations and organizations such as the Colorado Municipal League, the Association of Records Managers and Administrators, the U.S. Conference of Mayors, and similar professional or municipal associations and organizations.

Retention: 2 years

7.210 MINUTES

See *4.60, Minutes and Supporting Documentation; 7.70, Committees – Internal;* and *8.110, Minutes and Supporting Documentation.*

7.220 NEWS CLIPPINGS

See *9.120, Scrapbooks.*

7.230 NEWS RELEASES

See also *7.290, Public Relations Records.*

A. *Releases – Policy or Historical Value*
Prepared statements or announcements issued to the news media announcing municipal events, new programs, program changes or termination, major shifts in policy and changes in officials or senior administrative personnel.

Retention: Permanent

B. *Releases – Routine*
Prepared statements or announcements of minor or routine events, activities, etc.

Retention: 3 years + current

7.235 OPEN RECORDS REQUESTS AND SUPPORTING DOCUMENTATION <Added 2/08>

Formal requests for records submitted in accordance with state law and supporting documentation relating to the municipality's response to or denial of the request.

Retention: 1 year + current after request is answered

7.240 ORGANIZATION FILES

Records that contain organization charts, reorganization studies and similar information that illustrates or provides a detailed description of the arrangement and administrative structure of the municipality.

Retention: Permanent

7.250 PETITIONS, OBJECTIONS AND REMONSTRANCES

See *7.80, Complaints, Routine Service Requests and Nonbinding Petitions; 7.90, Correspondence and General Documentation;* and *3.110, Petitions – Election.*

7.260 POLICIES AND PROCEDURES DOCUMENTATION

Written instructions, rules and guidelines in manual form documenting current and past authorized municipal policies and procedures, including departmental or organization-wide directives, policy or operations manuals, instruction manuals, handbooks and memoranda setting out responsibilities and guidelines or outlining policies and procedures. See also *7.140.C, Policy and Program Development Records*.

A. Clerical Manuals – Routine

Retention: 2 years after superseded or obsolete

B. Manuals from External Sources

Retention: Until superseded or no longer needed

C. Policies and Procedures Documentation – In General

Documentation, including written materials such as personnel policy manuals and standard operating procedures, that would be useful in establishing past policies or procedures in liability cases, personnel disputes and other circumstances.

Retention: Permanent

Duplicate Copies: Until superseded

7.270 PROGRAM RECORDS

Records pertaining to ongoing or special events or activities held at municipal facilities and programs provided by the municipality as recreational or cultural amenities for the community. See also *7.140.C, Policy and Program Development Records*.

A. Districts

Records of districts that provide program services to municipal residents, such as recreation districts, library districts, etc. See *7.365 Special District Records.* <Amended 2/08>

B. Facility and Program Use Records

Records relating to registration and admission to programs sponsored by the municipality, room and facility reservation sheets, permits for facility or park usage, annual or seasonal passes for recreational programs, program and event descriptions, documentation of public use of facilities for which formal registrations or permits are required, etc. <Amended 2/05>

Retention: 1 year + current

C. Fees and Rates

See *5.20, Accounts Receivable Records* and *5.150, Fee and Rate Schedules and Supporting Documentation.*

D. Liability Waivers

Forms signed by program participants to release the municipality from any liability related to various activities.

Retention: 3 years + current

E. Library Records

Records pertaining to the operation of a library by the municipality.

1. Book Requisitions

Retention: 1 year + current

2. Catalogs

Finding aids in card or computer form that provide patrons with access to library holdings.

Retention: Until superseded or obsolete

3. Circulation Statistics

Retention: Permanent

4. Gift Register

Retention: Permanent

5. Interlibrary Loan Transactions/Reciprocal Borrowing Sheets

Retention: 3 years + current

6. Patrons' Registration Forms

Retention: 6 years + current

F. Museum Records

Records documenting the acquisition and ownership of museum materials in museums, local history collections, and similar collections or repositories owned and operated by the municipality, including: raw (untouched) image files of museum artifacts; temporary custody forms documenting chain of custody of materials held for review pending a decision on permanent acquisition; contracts of gift or deeds of gift forms documenting permanent acquisitions; incoming loan and outgoing loan forms documenting the chain of custody of materials loaned to the museum or loaned by the museum to other repositories; and deaccession records documenting the removal of materials from the collection. <Amended 2/08>

Retention: Permanent

G. Other Programs Sponsored by Municipality

Documentation needed for reference in developing future programs, including program flyers, press releases, etc. Examples of municipal programs include recreation, senior citizen and youth programs. See *7.140.C, Policy and Program Development Records.*

H. Support Groups – Municipal Programs

Groups organized in support of municipal programs, such as senior citizen community groups, youth groups, Friends of the Library or Museum, and similar groups. See *7.120, External Groups and Agencies.*

I. Sister City Program
Records of participation of the municipality in sister programs with cities in other countries, including documentation of selection of sister cities, administration of the program, exchange visits, photographs and related documentation.

Retention: Permanent

7.280 PROJECT FILES

A. Capital Projects <Amended 2/08>
Records of capital projects, professional services relating to capital improvements and projects relating to the design, engineering, construction, major repair, renovation or demolition of municipally owned structures, buildings, facilities, bridges, streets and roadways, utility system features, public works, parks, stormwater and storm drainage facilities, dams and reservoirs, other water projects, fiber optics and communications structures and other infrastructure. Project files may include documentation such as final project reports, specifications and contract documents, certificates of insurance, project-related permits and licenses issued to the municipality by other entities, notices to proceed and of final settlement, project pay estimates, change orders and correspondence and general documentation.

Retention: 6 years + current after replacement, demolition or transfer of the improvement to another entity, except that routine material may be purged when eligible for destruction under this Retention Schedule and except that, prior to destruction, the records must be evaluated for continuing legal, administrative or historical value [CRS 24-16-105]

1. Project Bonds

a. Labor and Materials Bonds
Surety or other types of bonds received from contractors to guarantee payment by the contractor to workers, subcontractors and suppliers.

Retention: 6 years + current after expiration or project completion, whichever is later <Amended 2/08>

b. Performance and Payment Bonds
Surety or other types of bonds received from contractors to guarantee performance and payments for municipal projects.

Retention: 1 year + current after project completion

2. Project Control Files
Contain routine memoranda, preliminary reports, and other general documentation and records documenting assignments and the progress of projects. Note: Does not include *final* reports, which are to be retained as part of the project file (see above).

Retention: 1 year after project is closed

B. Information Technology Projects [Reserved] <Added 2/08>

C. Noncapital Projects <Added 2/08>
Records relating to other types of "projects" that do not relate to capital improvements; i.e., these would typically be working files documenting an activity, plan, program, assignment, new undertaking, etc. See *7.140, General Subject Files.*

7.290 PUBLIC RELATIONS RECORDS

Speeches, addresses, and comments of public officials, remarks made at formal municipal ceremonies by elected municipal officials, state of the city addresses, etc. Includes paper, videotape, motion picture or tape recordings. See also *7.230, News Releases*.

Retention: Permanent

7.300 PUBLICATIONS

Documents printed or otherwise produced for wide internal or external distribution, including annual reports, brochures, pamphlets, leaflets, studies, proposals, newsletters, instructional materials, and similar materials printed by or for the municipality or any of its departments, and made available to the public. See also *Appendix A Non-Records* relating to publications of other agencies or entities that are not considered to be municipal records for retention purposes.

Retention: Permanent

7.310 RECORDS FINDING AIDS

Manual or automated indexes, lists, registers, and other finding aids designed to make it easier to locate pertinent files or information.

Retention: Life of the record for which the finding aid is designed to facilitate use and retrieval

7.320 REGULATIONS AND STANDARDS

Documentation of rules, regulations, standards and similar guidelines and requirements adopted by the municipality in relation to various activities and functions. Examples include building regulations and standards, subdivision and zoning regulations, cemetery rules and regulations, streetscape standards, street and sidewalk construction standards, water and sewer line installation standards, mobile home standards, etc.

Retention: Permanent

Duplicate Copies: Until superseded

7.330 REPORTS

Written reports regarding the operations or activities of the municipality or its individual employees, departments or service areas, prepared for use in compiling other reports, planning and budgeting, monitoring work progress, etc.

A. Annual Reports

Summary annual reports of individual departments or the municipality as a whole on primary program activities and accomplishments for the previous year; may include statistics, narrative reports, graphs, and diagrams.

Retention: Permanent

B. Daily Reports

Reports documenting the daily activities of employees or work units.

Retention: 1 year + current

C. Monthly Reports

Reports of staff or departments on program activities and accomplishments for the previous month.

Retention: 1 year + current

D. *Quarterly Reports*
Reports of staff or departments on program activities and accomplishments for the previous three months.

Retention: 2 years + current

E. *Weekly Reports* <Added 3/07>
Reports of staff or departments on program activities and accomplishments for the previous week.

Retention: 1 year + current

7.340 RETENTION SCHEDULES AND COMPLIANCE CERTIFICATES

Authorizations for the retention or disposition of records issued for the municipality and its departments by the Colorado State Archives and certificates of compliance completed to track the authorized destruction of municipal records.

Retention: Permanent

7.350 RULES AND REGULATIONS

See *7.320, Regulations and Standards.*

7.360 SOFTWARE AND SOFTWARE MANUALS

See *6.50.G, Software Management.*

7.365 SPECIAL DISTRICT RECORDS <Added 2/08>

Records pertaining to water, sanitation, flood control, urban drainage, metropolitan, airport, library, fire, ambulance and other special districts that provide services within the municipality, including service area plans, boundary maps, service agreements, intergovernmental agreements, memoranda of understanding, other agreements and contracts, and supporting documentation.

Retention: 6 years + current after the district's agreement with the municipality no longer has any binding effect, then evaluate for continuing value prior to destruction

7.370 STANDARDS

See *7.320, Regulations and Standards.*

7.380 STUDIES, PLANS AND REPORTS

Documents prepared by the municipality or by external entities on behalf of the municipality. Examples include feasibility studies, planning and land use studies, basin plans, capital projects reports, transportation system plans, master street plans and similar documents that have long-term reference or historical value. Studies, plans and reports retained by the municipality that are prepared by or on behalf of other entities, and which include information of interest to the municipality, should be evaluated for long-term reference or historical value to the municipality. See also *7.330, Reports* and *11.130, Plans, Studies and Reports.*

Retention: Permanent

7.390 SURVEYS AND QUESTIONNAIRES

Copies of completed miscellaneous surveys, questionnaires and similar instruments that are routine and are received and completed by the municipality for return to the originator.

Retention: 1 year + current

7.395 SURVEYS CONDUCTED BY MUNICIPALITIES *<Added 4/06>*

A. Compilations

Retention: Permanent

B. Survey Responses

Retention: 1 year + current after compilation complete

7.400 TRAINING AND CONFERENCE MATERIALS

Records documenting activities of municipal officials or employees at seminars, conferences or other training sessions not sponsored by the municipality, including instructional materials obtained by officials and staff members at conferences, seminars or other types of external training sessions. See also *15.270, Training Information*.

Retention: 2 years

7.410 WORKSHEETS AND DRAFTS

Documents such as rough notes, calculations or drafts assembled or created and used to prepare or analyze other documents; records of a preliminary or working nature which do not represent significant steps in the preparation of the final version of documents; includes informal notes, preliminary drafts of letters, memoranda, reports, computer or printer output used to verify information entered into a computer and not considered to be a final copy, etc. See also *5.380, Worksheets – Financial.*

Retention: Until no longer needed